Streamline Workflow, Eliminate Duplication, and Improve Processing of Payroll Actions

Lean Project Progress Report: August 28, 2012

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Event Date	January 11 – 12, 2012		
Background	Employment paperwork passes from the Human Resources (HR) Office to the Payroll Unit on a daily basis. During payroll deadlines there are multiple trips, phone calls, and emails between units. Each unit is required to complete their designated tasks by payroll processing deadlines to ensure correct payment to employees.		
Project Objective(s)	• Reduce the time it takes to transfer paperwork from HR to Payroll. • Reduce paper. • Reduce errors. • Improve workflow planning and communication.		
Value Stream Mapping Outcome	**Current Situation (Old Way)**	**Future (New Way)**	**Benefits**
	HR and Payroll Staff transport documents from one unit to another several times per day.	HR staff scan documents into secure SharePoint site, which allows payroll staff to view payroll actions and print only what is needed.	Reduces time spent traveling between 1st & 3rd floors. Reduces paper.
	HR Tech Team Lead audits 100% of the work completed by the Tech Team	Tech Team Lead will reduce the audits performed on senior Tech Team work from 100% to a sample. For newer Tech Team members, continue 100% audit – reduce audit percentage as knowledge & experience increase.	Allows for more thorough audit of documents prior to payroll cut off by reducing number of audits performed.
	Payroll Fiscal Analysts conduct 100% audits of payroll actions completed by Payroll Processing Team.	Audit only those actions that impact ongoing salary, benefit & leave calculations. Eliminate audit of CTR, taxable travel, & timesheet changes.	Reduces significant amount of time spent on auditing.
Activities to Implement Future State	**Completed** • Completed SharePoint Training of Payroll staff – April 11, 2012. • Granted Payroll staff view-only access to HR Personnel Action Tracker on SharePoint – April 10, 2012. **In Progress** • Staffing changes within HR office may increase auditing. Continuing to monitor & set audit criteria. **Under Development** • Combining and eliminating multiple tracking logs within HR Office.		

Results to Date	• April 16-30 was the first pay period of the recommended solution implementation. Reliable savings data is not fully available. • A quick survey of staff found that payroll staff are making 1-4 fewer trips per day to HR, averaging 5-20 minutes per day.		
Discussion about Results	• It was obvious that trips between units would save time. The shared HR Personnel Action Tracker will accomplish this. • We aniticipate the time Payroll spends contacting HR either by phone call or email will also decline and save additional time. We also expect to see substantial time savings in reduced audit reviews. However, it is still too early in the process to accurately document. • As time goes on, we also expect to see some minor savings through paper reductions.		
Future Action Plan (Milestones)	**What?**	**Who?**	**When?**
	Combine tracking logs within HR office	Amy Heller & Dawn Russell	November 2012
	Eliminate Payroll tracking service requests	Kim Sigman	November 2012